SOFT DRINKS OVERVIEW

FEB 2026

THINK SHOPPER.
ACT CATEGORY.

AGENDA

1. MACRO TRENDS
2. KEY CATGORY FACTS
3. CATEGORY INSIGHT
4. TOP SELLERS
5. MERCHANDISING PRINCIPLES

CURRENT MACRO TRENDS AFFECT BOTH RETAILERS AND SHOPPERS

THINK SHOPPER. ACT CATEGORY.

MISSION BASED SHOPPING

Shoppers are often time-poor and we see an increase in mission-based shopping. Retailers have an opportunity to optimise store layout and create clear zones with mission signposting

COMMUNITY

Increasingly we see local convenience stores become a focal point for the community. Opportunity for retailers to drive loyalty through connection to local community and offering additional services such as parcel delivery services, deli options etc

SUSTAINABILITY & ETHICAL CONSUMPTION

Shoppers are increasingly more mindful about where the products they're consuming are coming from and look for ethical sourcing as well as eco-friendly packaging. Transparency between brands, retailers and shoppers is key

OMNI CHANNEL INTEGRATION

With most shopper journeys starting online, omni-channel integration becomes ever more important for retailers. Those who leverage drive increased loyalty and sales

WITH A NUMBER OF TRENDS ALSO DIRECTLY AFFECTING THE SOFT DRINKS CATEGORY

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GLP-1s

In and out of home consumption has been affected by the rise of consumers using GLP-1s for weight management. Consumers are looking for calorie control and protein rich food & drink offerings

FUNCTIONAL HEALTH

Consumers are leaning into 'food as medicine' and seeking added benefits to meet daily essential nutrient needs and get added benefits. Educating at fixture will be key

ALCOHOL ALTERNATIVES

Adults in the UK are increasingly lowering their alcohol consumption or abstaining entirely. We see a growth in the interest of premium adult soft drinks as consumers look for alternatives aside from traditional softs and alcohol-free products

HFSS

HFSS has led to shoppers changing both shopping and consumption habits. Low & no sugar offerings begin to play a bigger role in the category. Multipacks drive volume where multibuys have been removed

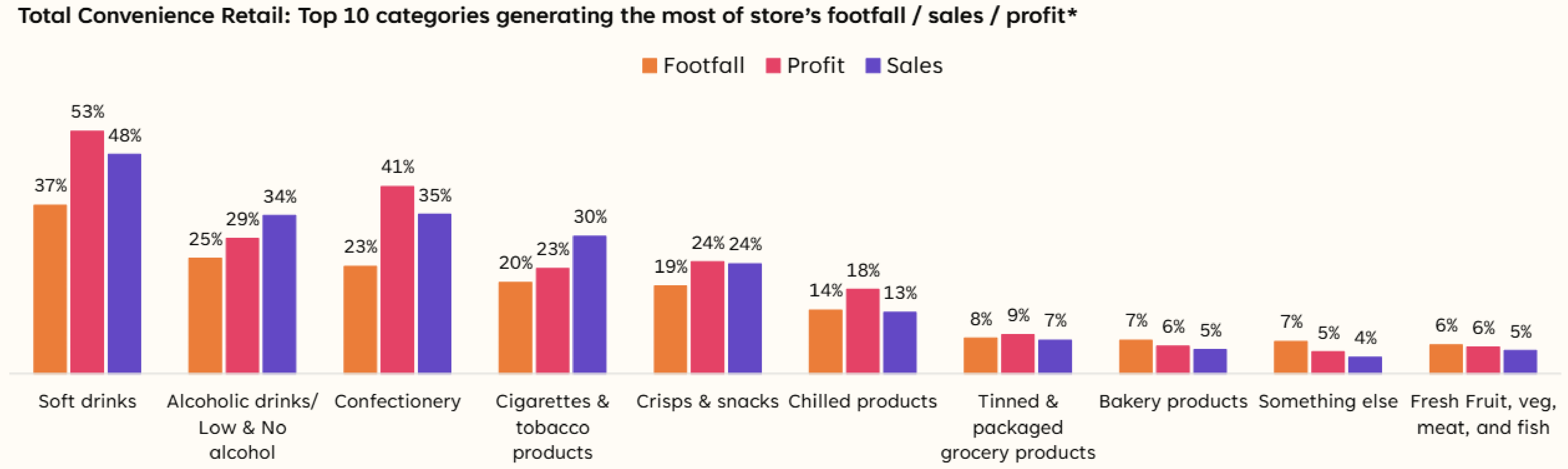
KEY CATEGORY FACTS

THINK SHOPPER. ACT CATEGORY.

1.	Soft Drinks are worth £2.5bn in the last year in Total Independents & Symbols and is up 10% vs YA.
2.	S&E is now worth over £1bn and is the largest segment in Indies & Symbols, followed by Cola (£489M) and Flav Carbs (£333M)
3.	Red Bull (+18.8%) is the #1 Brand in Indies & Symbols followed by Monster (+26.5%) and Coca-Cola (+0.0%)
4.	20 Single Serve Sports & Energy Drinks are sold every second in Symbols & Indies in the UK – Keep your fridges stocked to maximise sales

Source: NIQ Discover Total Symbols & Indies Total Soft Drinks L52W W.E. 31.01.26

SOFT DRINKS DRIVE THE HIGHEST FOOTFALL, PROFIT AND SALES WITHIN CONVENIENCE RETAIL



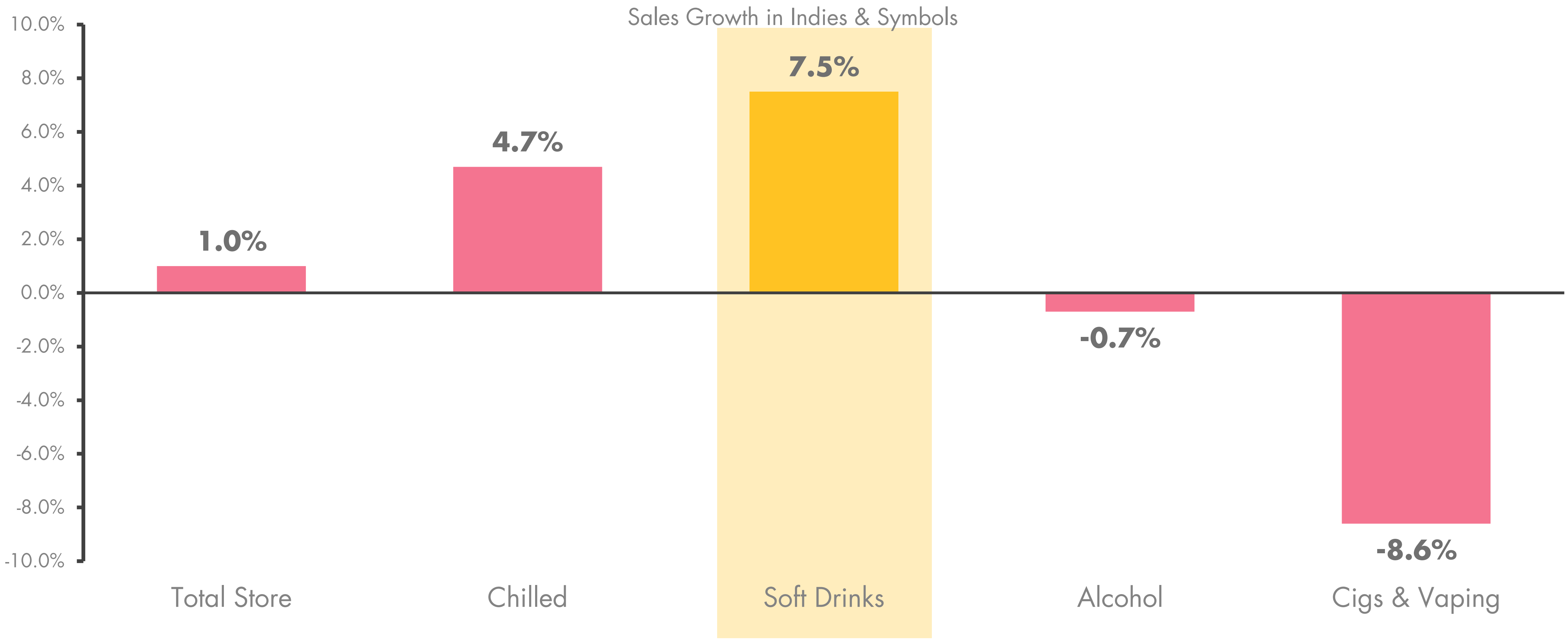
*Note: The definition of profit is subject to retailer interpretation

Source: Lumina Intelligence Retailer Attitudes & Behaviours Study, June 2025


SOFT DRINKS ARE THRIVING
£2.5BN
IN VALUE
+10% VS YA
1.6BN
IN UNITS
+5.2% VS YA
Source: Nielsen Discover Soft Drinks (Total Indies & Symbols) – 52 W/E 31/1/26

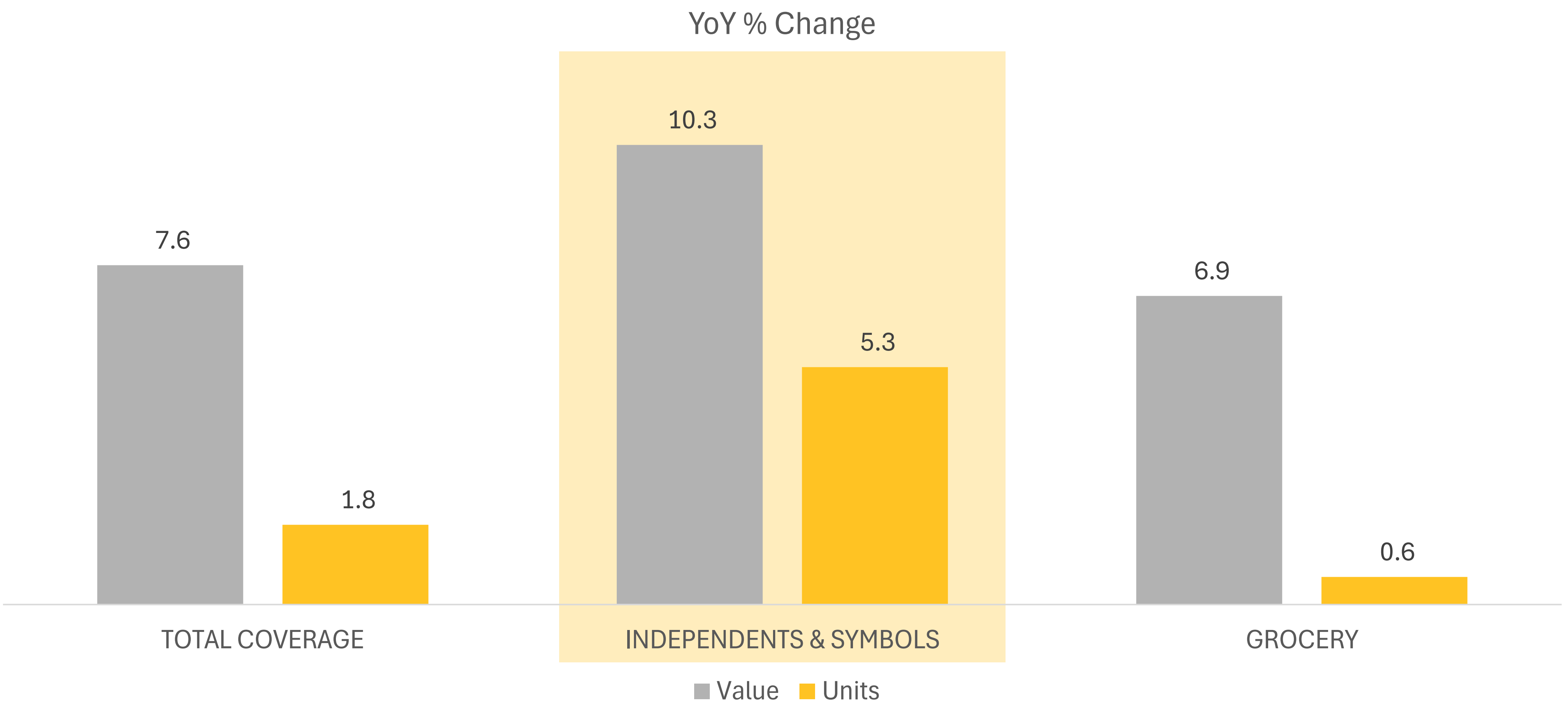
AND THE CATEGORY IS BECOMING MORE IMPORTANT POST VAPE BAN

THINK SHOPPER. ACT CATEGORY.



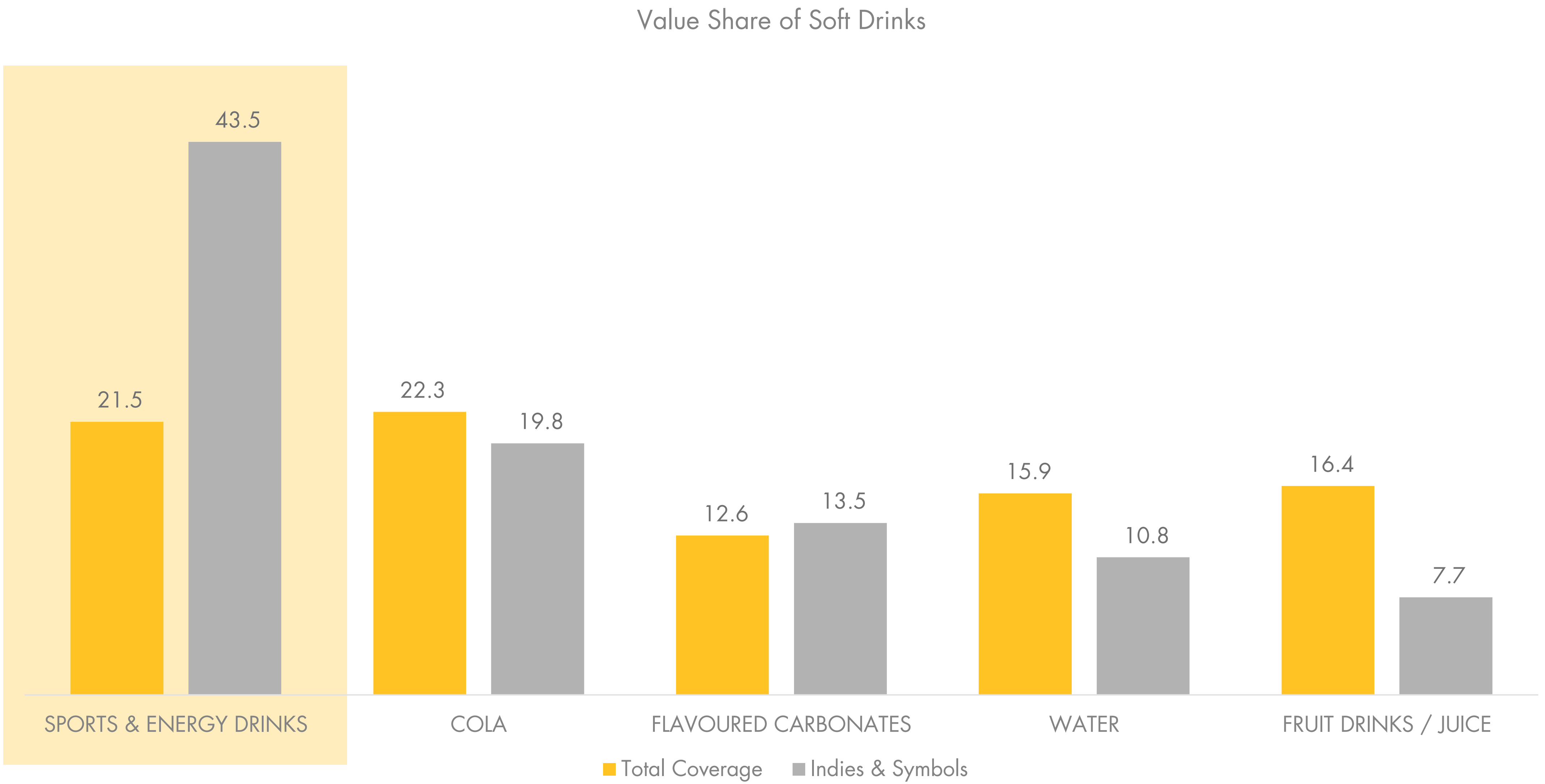
Source: Lumina Convenience Strategy Forum, 2025

WITH INDIES & SYMBOLS OUTPERFORMING THE MARKET



Source: Nielsen IQ | Soft Drinks | 52wks to 31/1/26

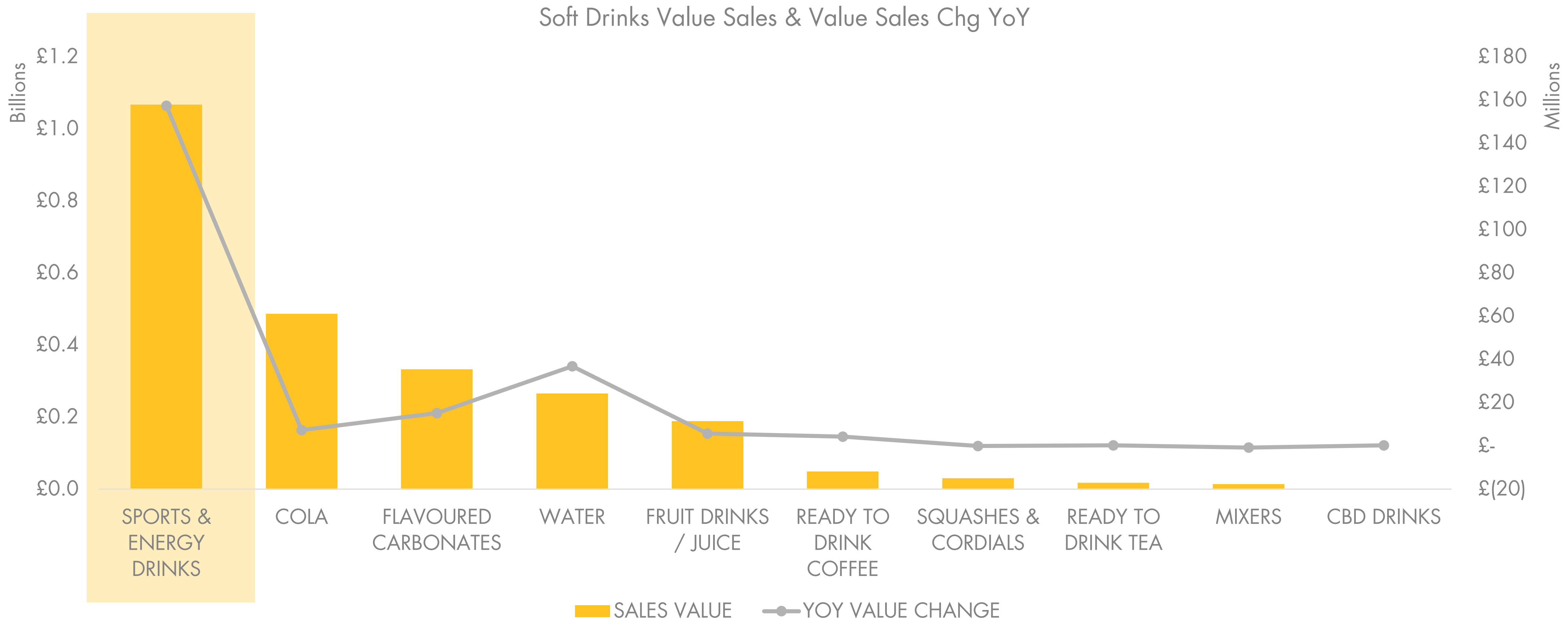
DRIVEN BY AN OUTPERFORMANCE IN SPORTS & ENERGY



Source: Nielsen IQ | Independents & Symbols | Soft Drinks | 52wks to /1/26

SPORTS & ENERGY IS NOW WORTH £1.1BN IN INDIES & SYMBOLS

DRIVING 4.3X AS MUCH YOY VALUE SALES AS THE NEXT BIGGEST GROWTH CONTRIBUTOR, WATER

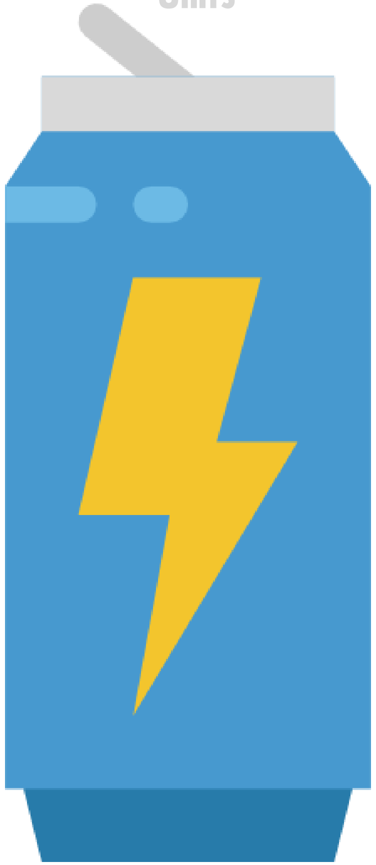


Source: Nielsen IQ | Independents & Symbols | Soft Drinks | 52wks to 24/1/26

ENERGY OUTSELLS BOTH COLA AND WATER COMBINED

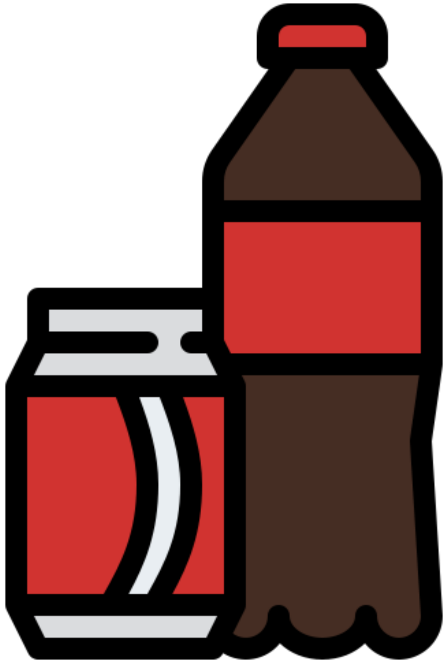
THINK SHOPPER. ACT CATEGORY.

661M
Units



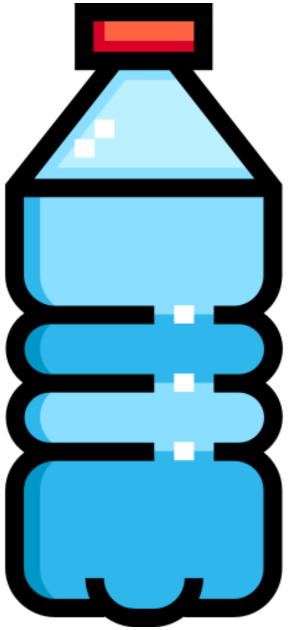
ENERGY

280M
Units



COLA

199M
Units

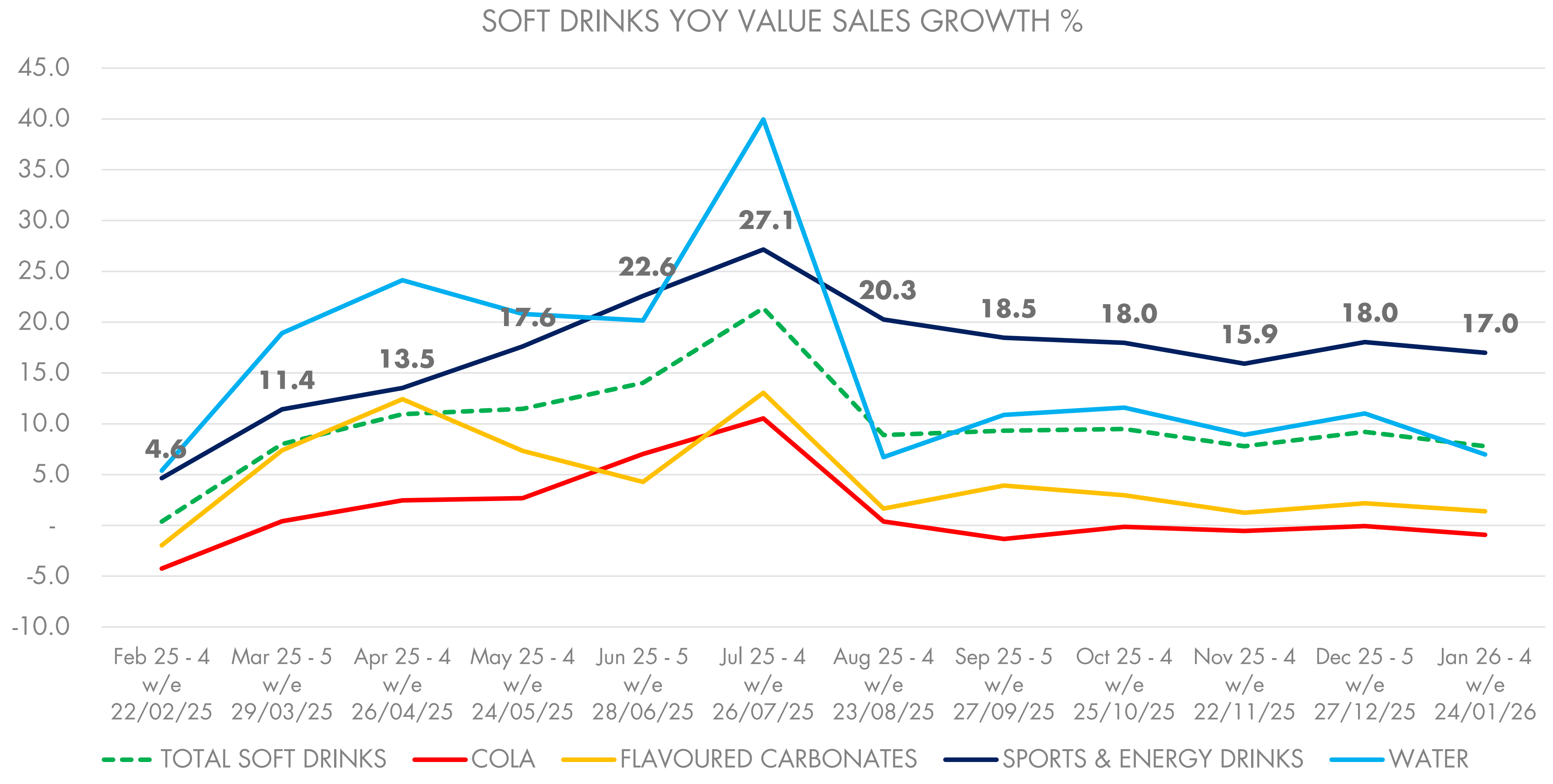


WATER

Source: Nielsen Discover Sector (Total Independents & Symbols) – 52 W/E 24/1/26

SPORTS & ENERGY CONSISTENTLY OUTGROWS THE REST OF THE CATEGORY

THINK SHOPPER. ACT CATEGORY.



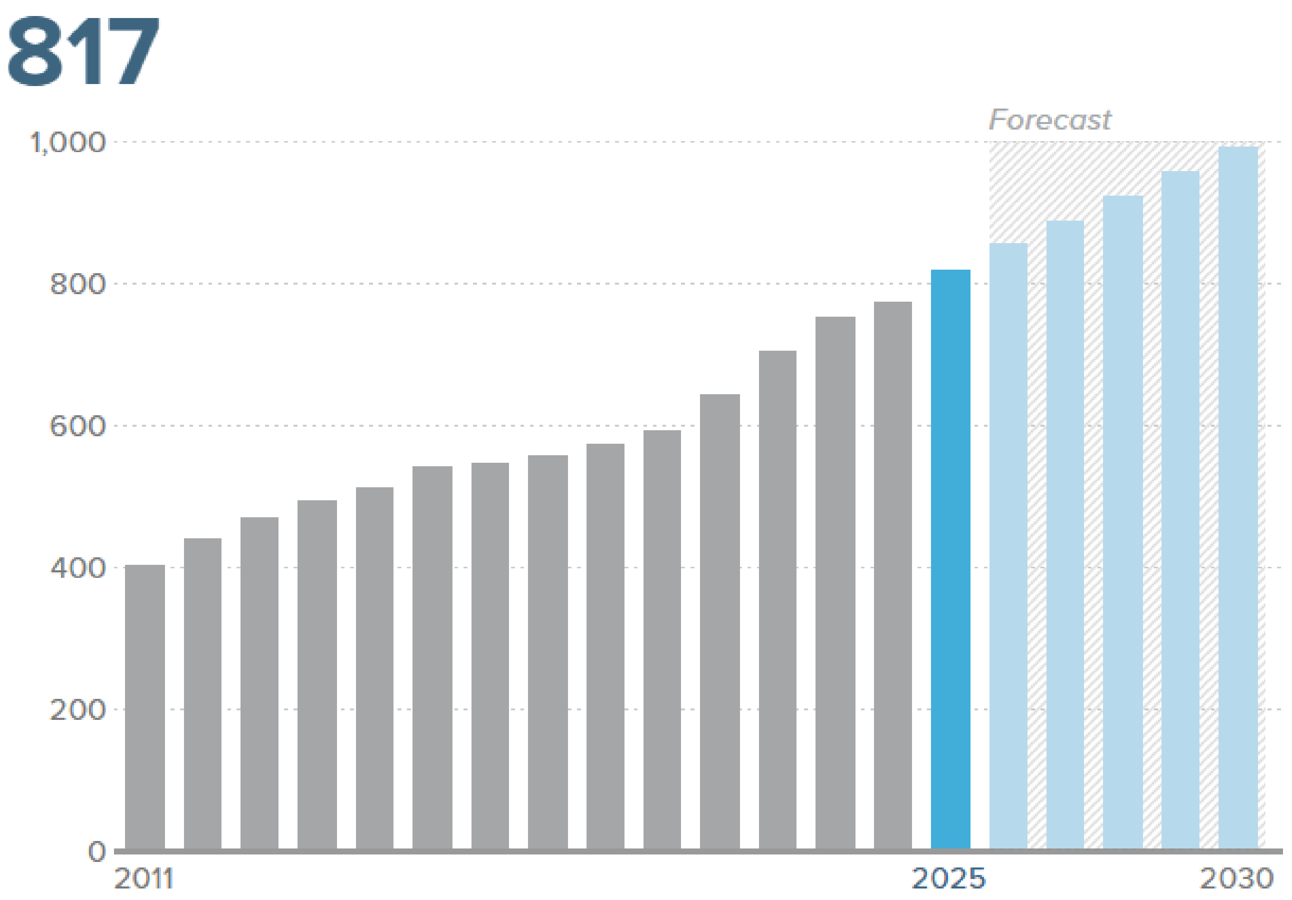
Source: Nielsen IQ | Soft Drinks | 4we to 24/1/26

A CATEGORY WHICH HAS SEEN CONTINUED YEAR ON YEAR GROWTH SINCE 2011

AND FORECASTED TO CONTINUE GROWING FOR THE NEXT 5 YEARS

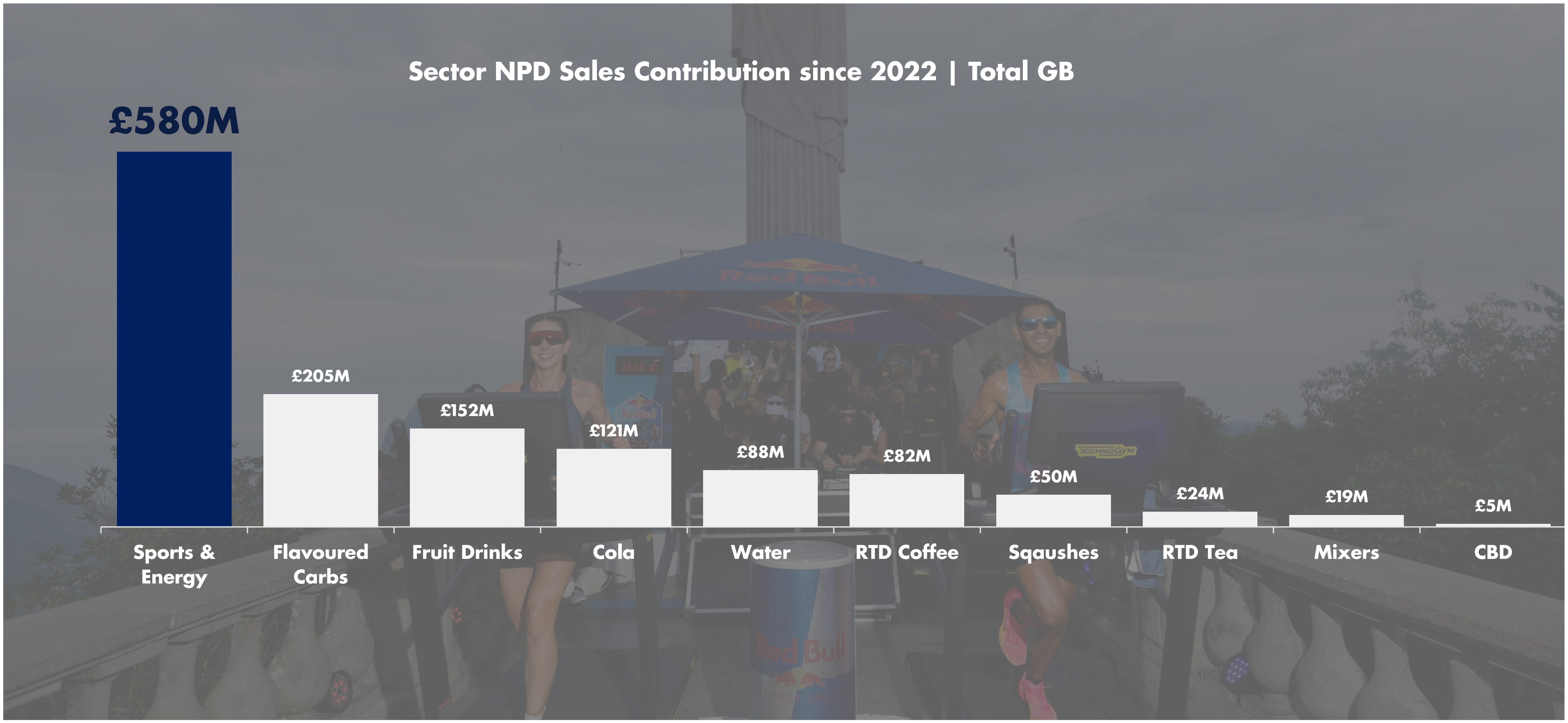
Sales of Energy Drinks

Off-trade Volume - million litres - 2011-2030



Source: Euromonitor Passport | Energy Drinks Country Report | November 2025

NPD IS DRIVING GROWTH



Source : NIQ RMS data to 01.11.2025. Total Value Sales of all NPD launched post WE 29.10.2022

S&E DEEP DIVE

KEY SPORTS & ENERGY DRINKS FACTS

THINK SHOPPER. ACT CATEGORY.

1. Sports & Energy is not only the biggest sector in Soft Drinks, but also the **biggest contributor** to growth – contributing **+£159m** vs last year

2. **3 of the top 5** biggest brands in the Soft drinks category are Sports & Energy. They make up 85% of S&E sales – Ensure you have the right range to drive sales

3. **8 of the top 10** bestselling Single Serve SKUs in Symbols and Indies are a Sports & Energy SKU – Stock the best performing SKUs with sufficient space

4. **Flavours** drive **64%** unit sales growth within Sports & Energy and bring in new shoppers – ensure you are keeping up with consumer flavour needs

Source: NIQ Discover Total Symbols & Indies Total Soft Drinks L52W W.E. 31.01.26

SPORTS & ENERGY SPLITS INTO 3 KEY SEGMENTS

FUNCTIONAL LEADS THE WAY IN SIZE AND CATEGORY GROWTH

THINK SHOPPER. ACT CATEGORY.

FUNCTIONAL ENERGY

£847M

+19.4%

SPORTS DRINKS

£118M

+14.8%

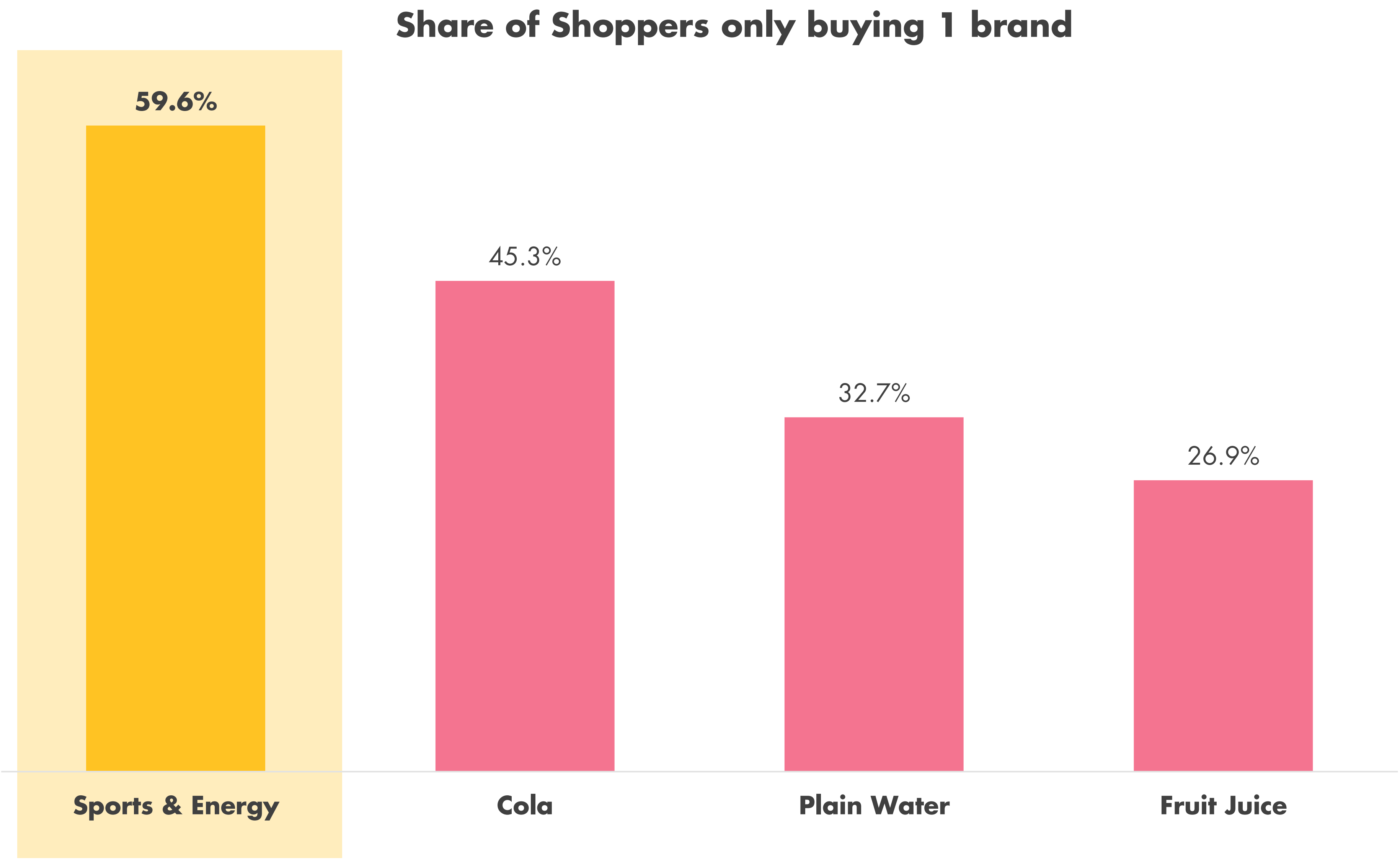
GLUCOSE ENERGY

£105M

+6.3%

Source: Nielsen IQ | Total Symbols & Indies | Sports & Energy Drinks | Value Sales & Value Sales YoY Growth % | 52wk to 31/1/26

ENERGY SHOPPERS ARE BRAND LOYAL

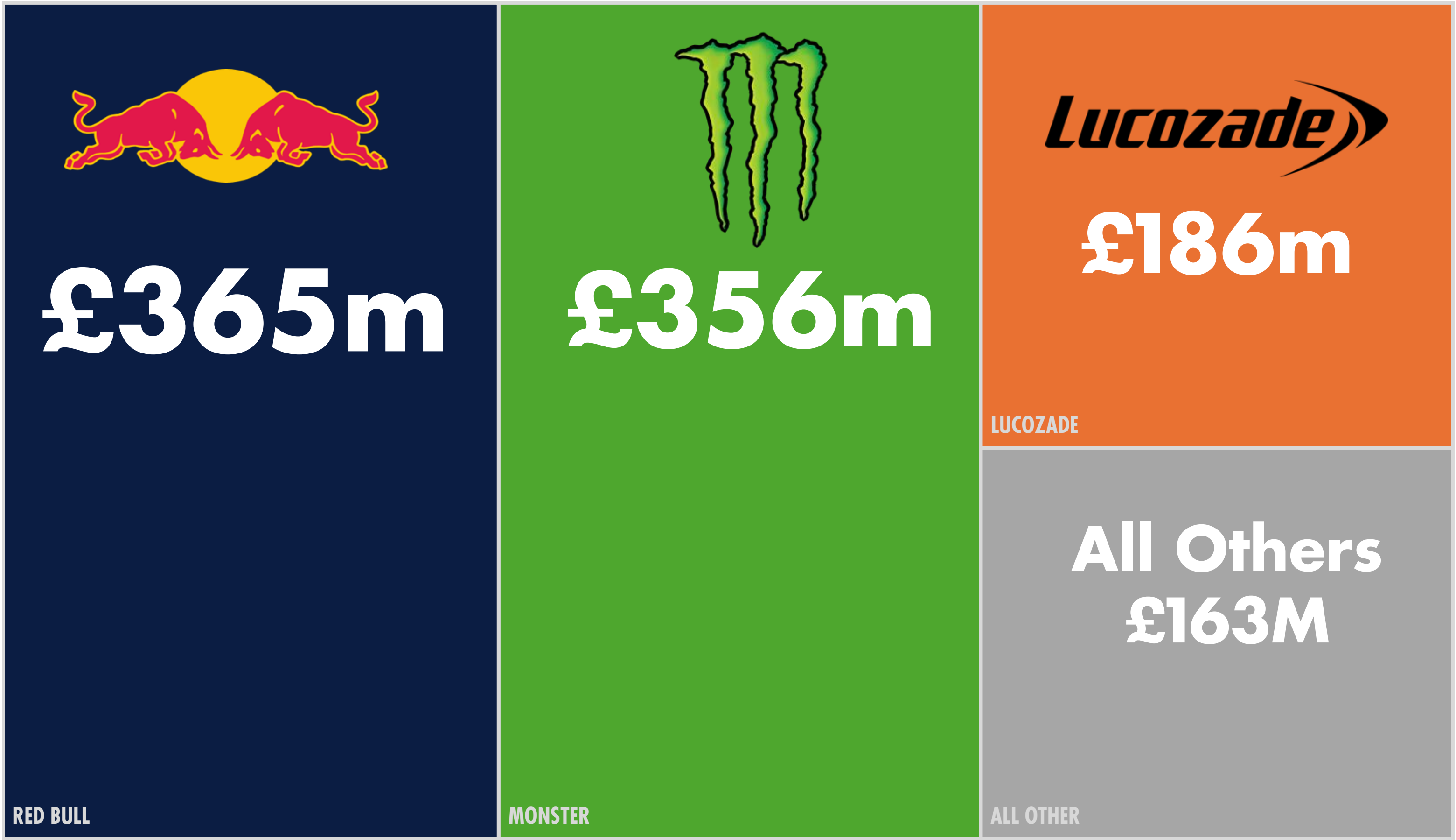


Source: Kantar Take Home Panel, 52 w/e 07 July 2025

3 BRANDS MAKE UP 85% OF CATEGORY VALUE

THINK SHOPPER. ACT CATEGORY.

VALUE SHARE OF S&E



Source: Nielsen IQ | Total Symbols & Indies | Sports & Energy Drinks | Value Sales Share | 52wk to 31/1/26

REFLECTED IN THE TOP 10 SKUS

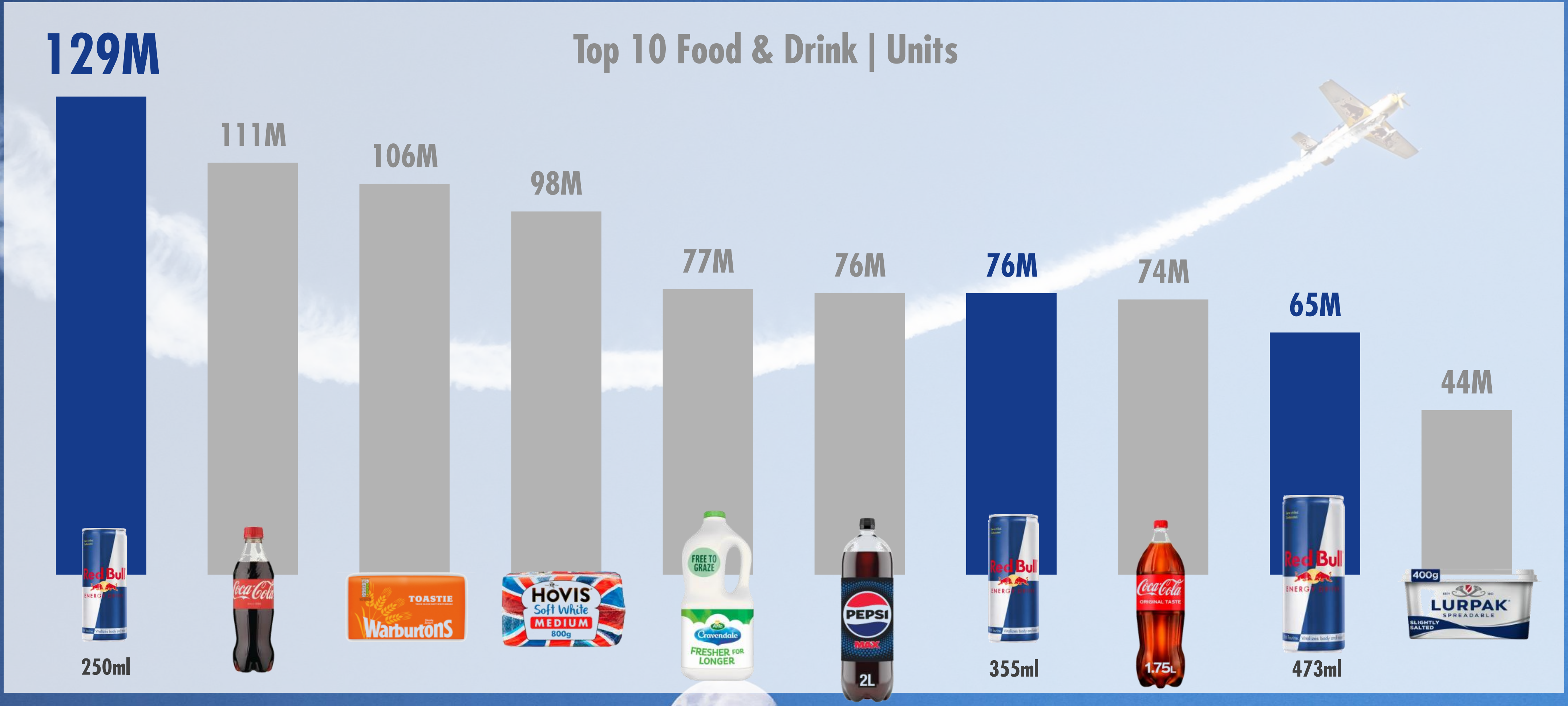
RED BULL IS THE BESTSELLING ENERGY DRINK IN THE MARKET

THINK SHOPPER. ACT CATEGORY.

Rank	SKU	SALES VALUE
1.	Red Bull 250ml	£102.8M
2.	Red Bull 473ml	£81.7M
3.	Red Bull 355ml	£79.3M
4.	Monster 500ml	£58.3M
5.	Monster Ultra 500ml	£45.4M
6.	Monster Mango Loco 500ml	£39.9M
7.	Monster Pipeline Punch 500ml	£33.0M
8.	Lucozade Sport Orange 500ml	£29.4M
9.	Lucozade Energy Orange 500ml	£28.7M
10.	Lucozade Energy Original 500ml	£18.7M

Source: Nielsen IQ | Total Symbols & Indies | Sports & Energy Drinks | SKU Value Sales | 52wk to 31/1/26

AND THE KEY SKUS SELL MORE THAN ANYTHING ELSE IN STORE



Source: Nielsen Scantrack | Total Coverage | Packaged Food & Drink Universe = Ambient Grocery, Fresh Foods, Frozen Foods, BWS & Impulse | Latest 52 w/e 22.03.25

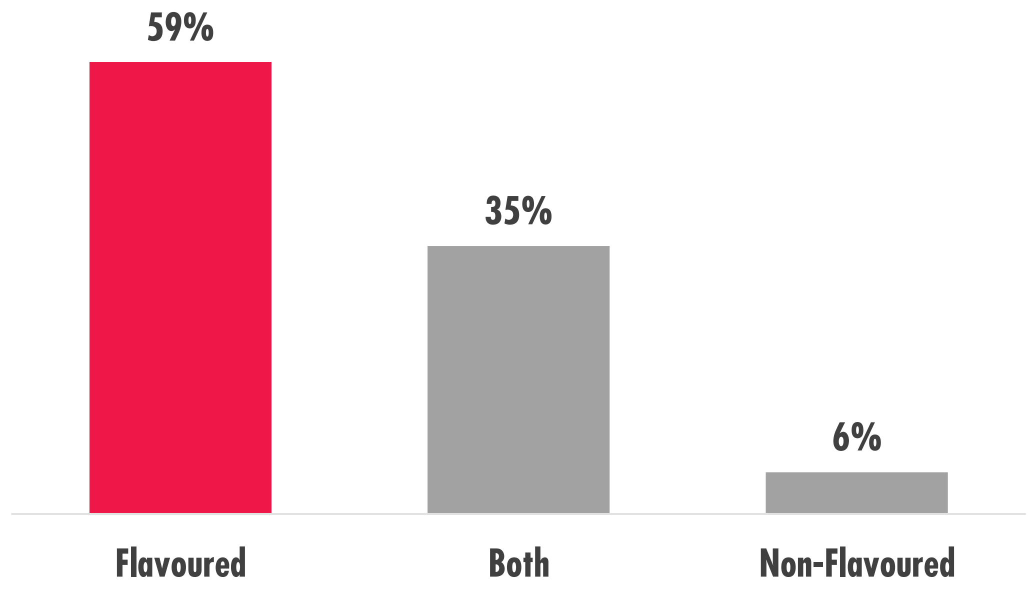
FLAVOURS ARE BECOMING INCREASINGLY IMPORTANT TO WIN NEW CONSUMERS

THINK SHOPPER. ACT CATEGORY.

Top Drivers of Energy Drink Consumption
Share of No. 1 Ranking

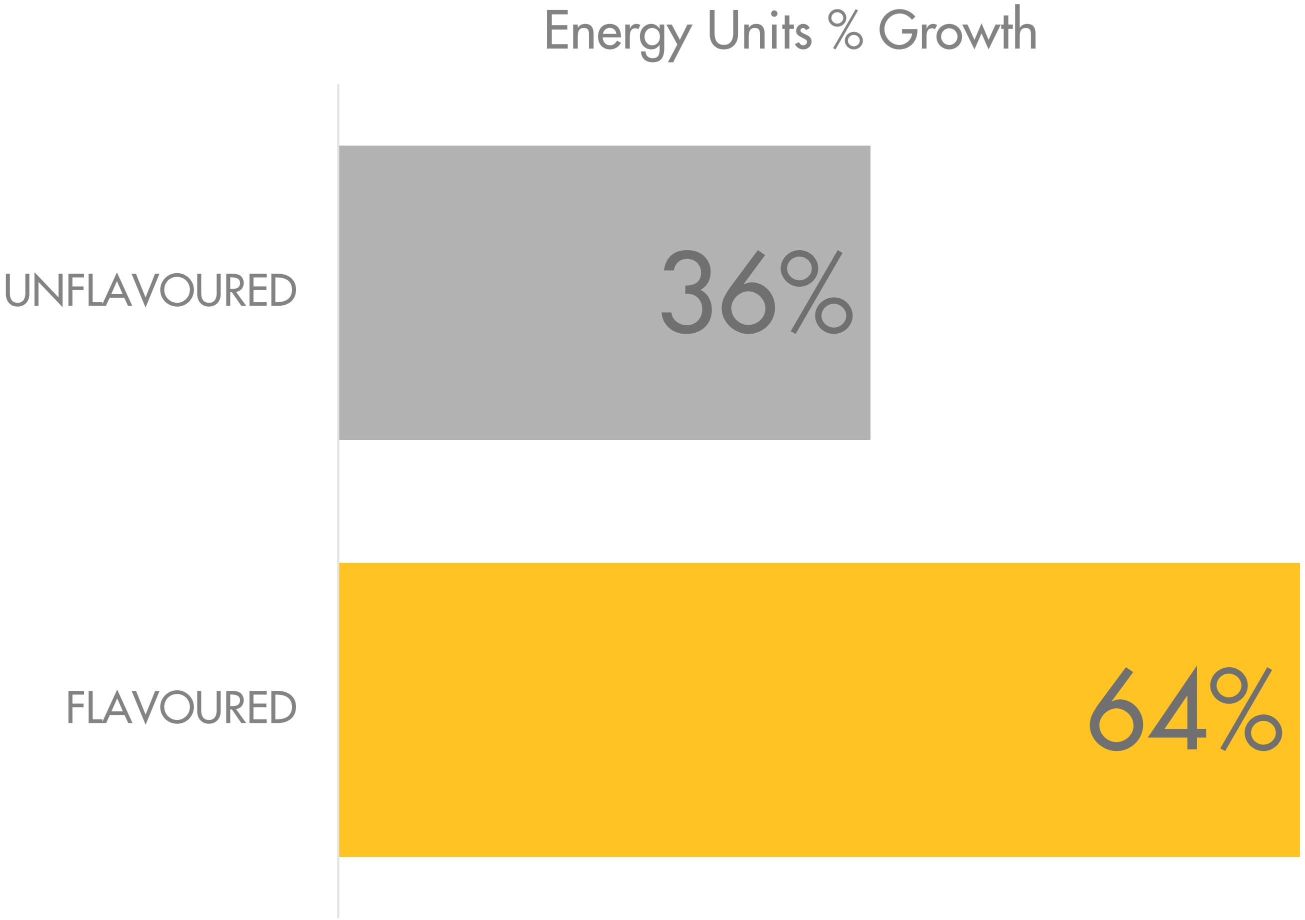
#1	TASTE/FLAVOUR
#2	BRAND
#3	PRICE

NON ENERGY DRINK BUYERS
% THAT WOULD CONSIDER



Source: ED Shopper Value Sensor Wave 1 2023, Global ED Shoppers n=17,840 / ED Shoppers n=1,000 / | APPINIO Editions Research March 2024, Non-Energy Drink Buyers n = 91

REFLECTED IN THE AMOUNT OF GROWTH THAT COMES FROM FLAVOURED SKUS



Source: Nielsen IQ | Sports & Energy Drinks | Unit Sales YoY % Chg| 52wk to 24/1/26

FLAVOURS ARE IMPORTANT FOR RECRUITING NEW SHOPPERS

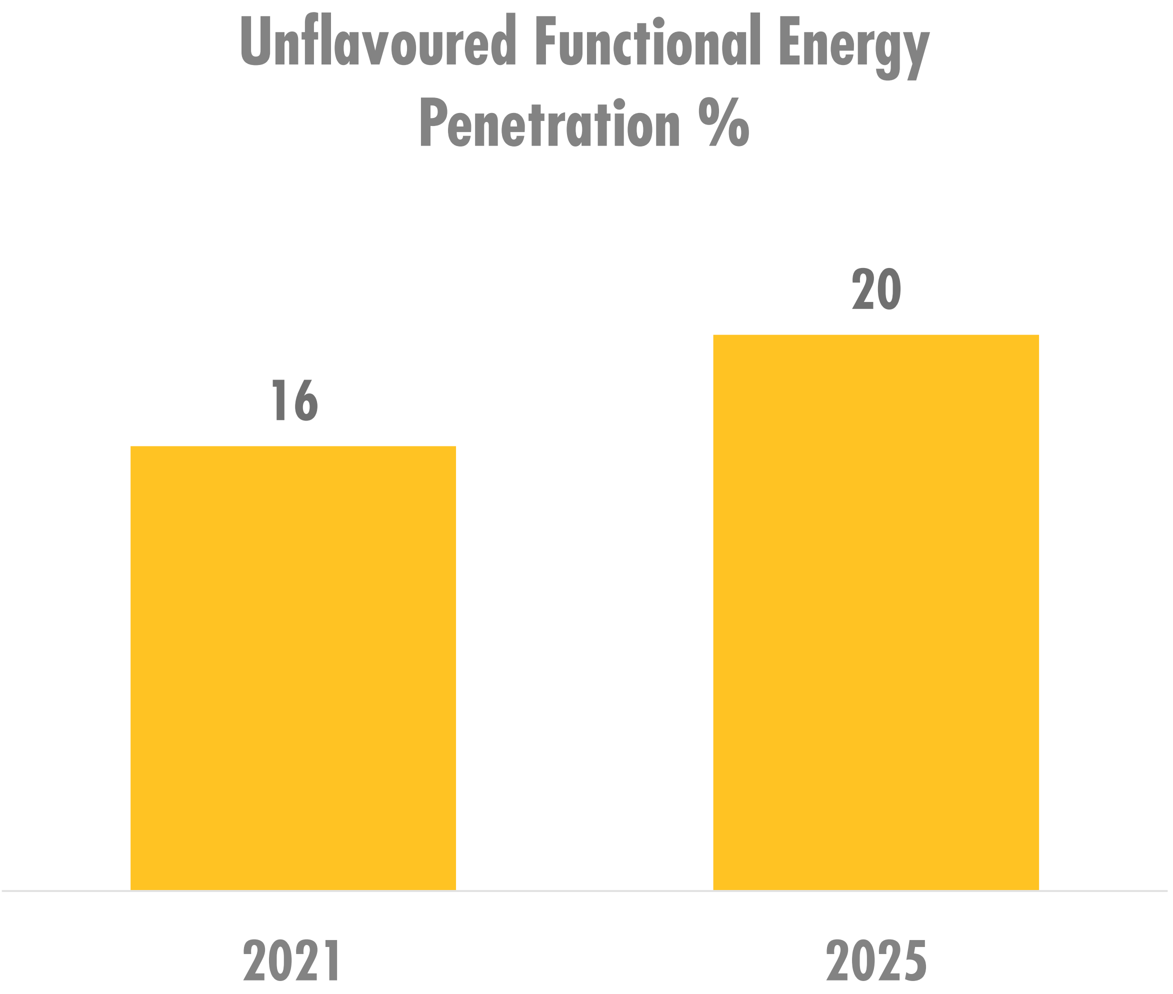
THINK SHOPPER. ACT CATEGORY.

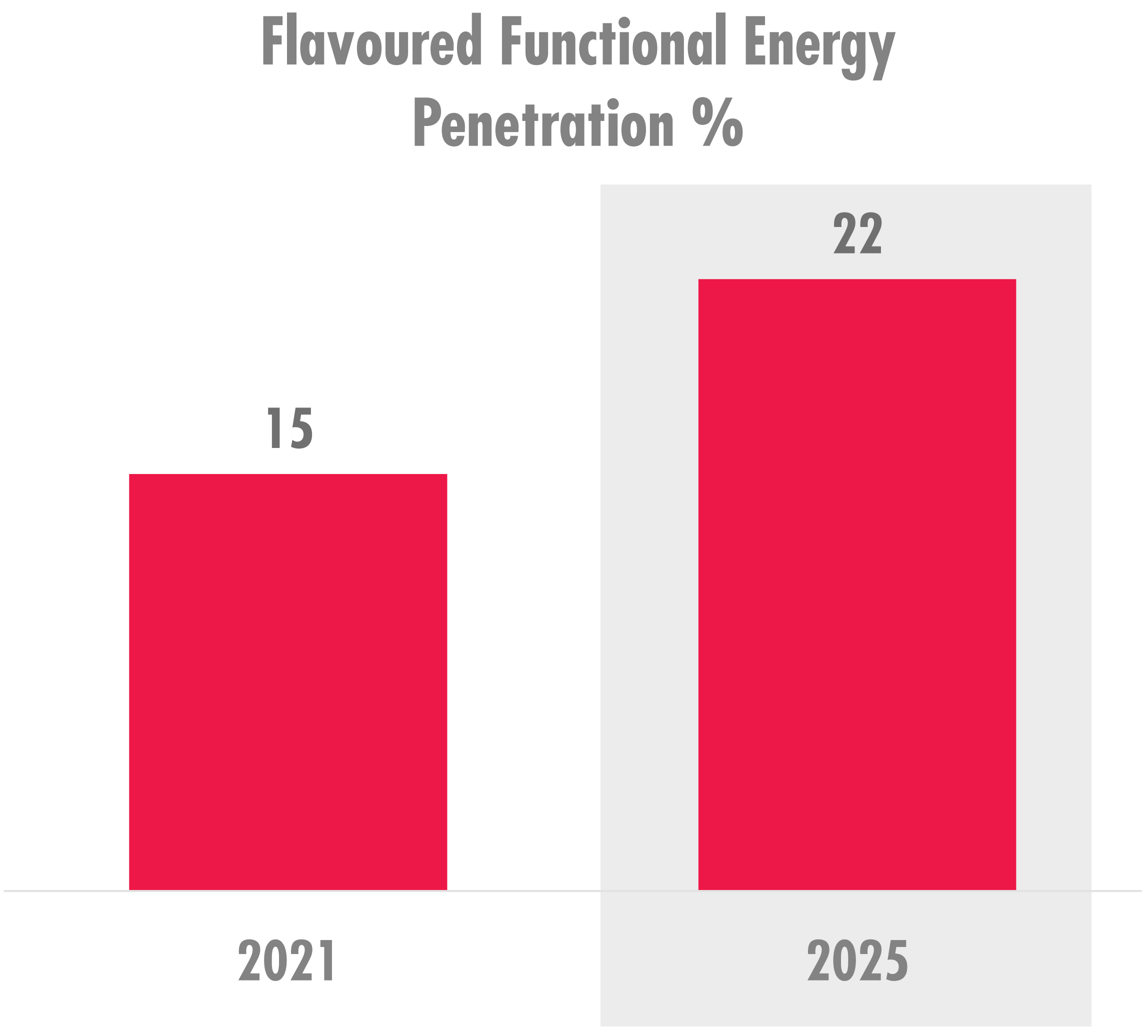
66%

Of New Functional Energy shoppers bought a flavour this year

Source: Kantar Take-Home Panel, Total Coverage, 52 weeks to 13th July 2025

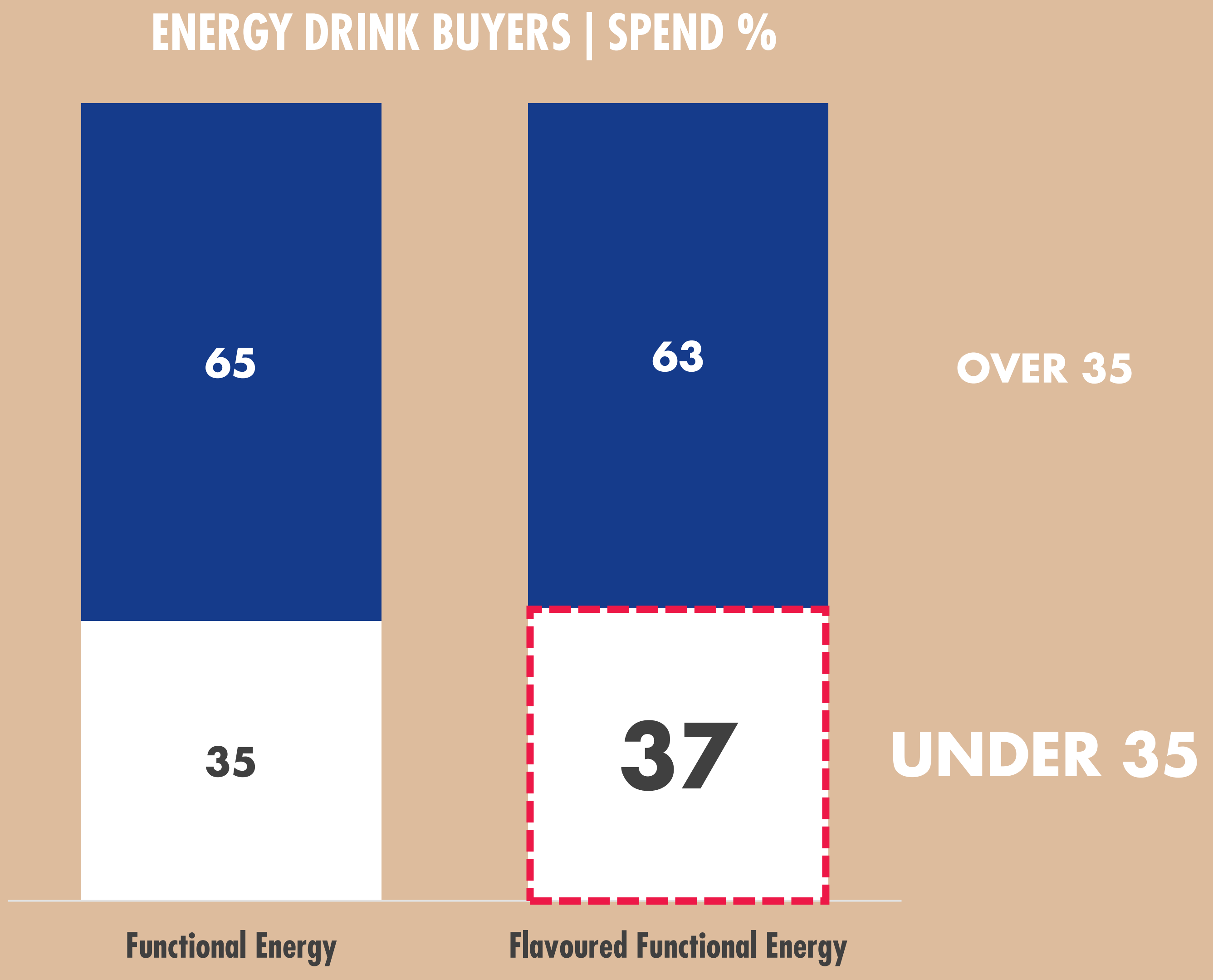
NOW REACHING A WIDER % OF HOUSEHOLDS THAN UNFLAVOURED



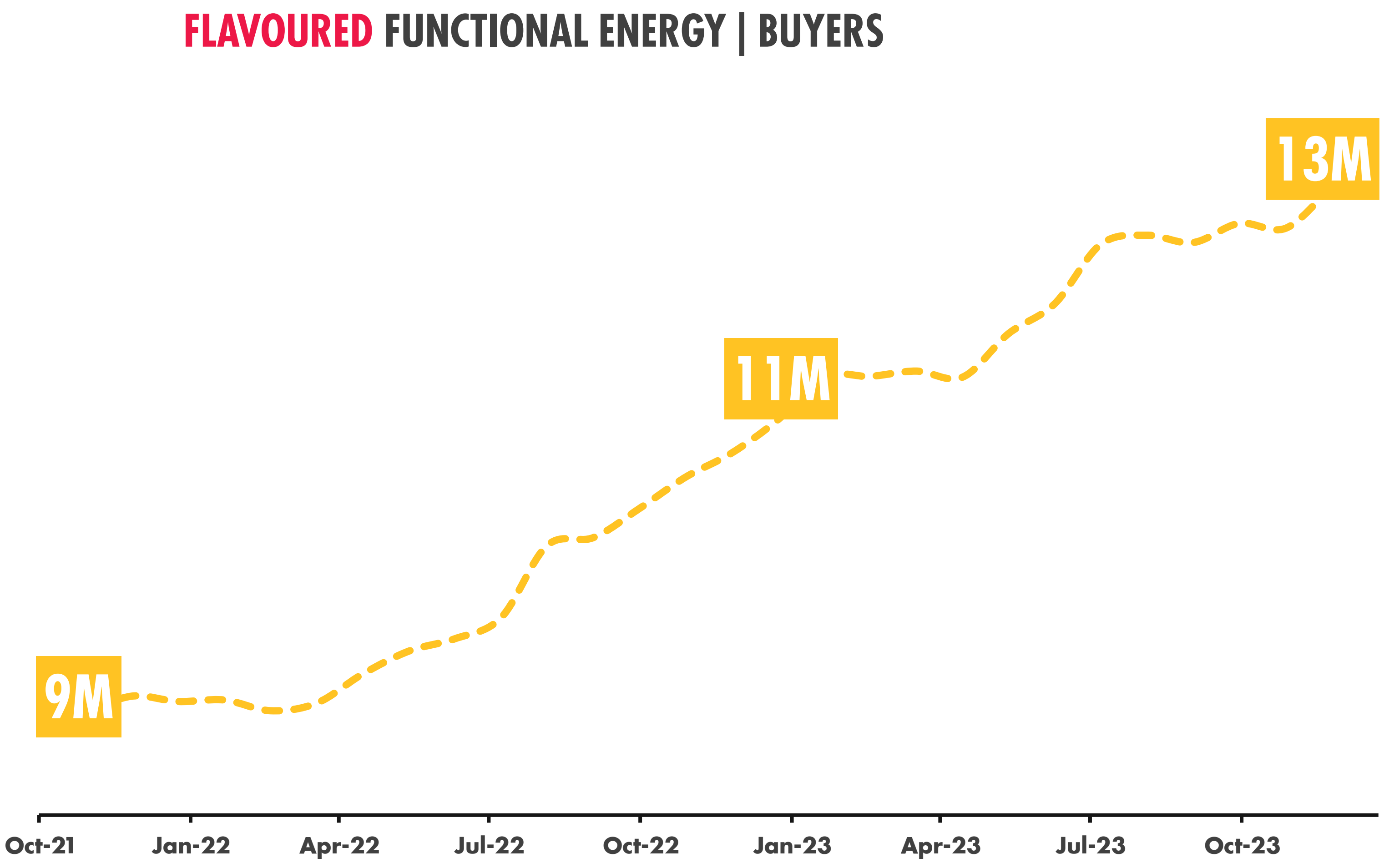


Source: Kantar Combined Panel | Total Coverage | 52wks to 20/4/25

SPEAKING TO A YOUNGER CONSUMER



& HELPS RECRUIT NEW SHOPPERS TO THE CATEGORY



Source: Kantar Take Home Panel | 52 weeks to July 2023 | MAT Dec 2023

LOW/NO SUGAR DRINKS BECOMING INCREASINGLY IMPORTANT TO SHOPPERS DUE TO MACRO TRENDS

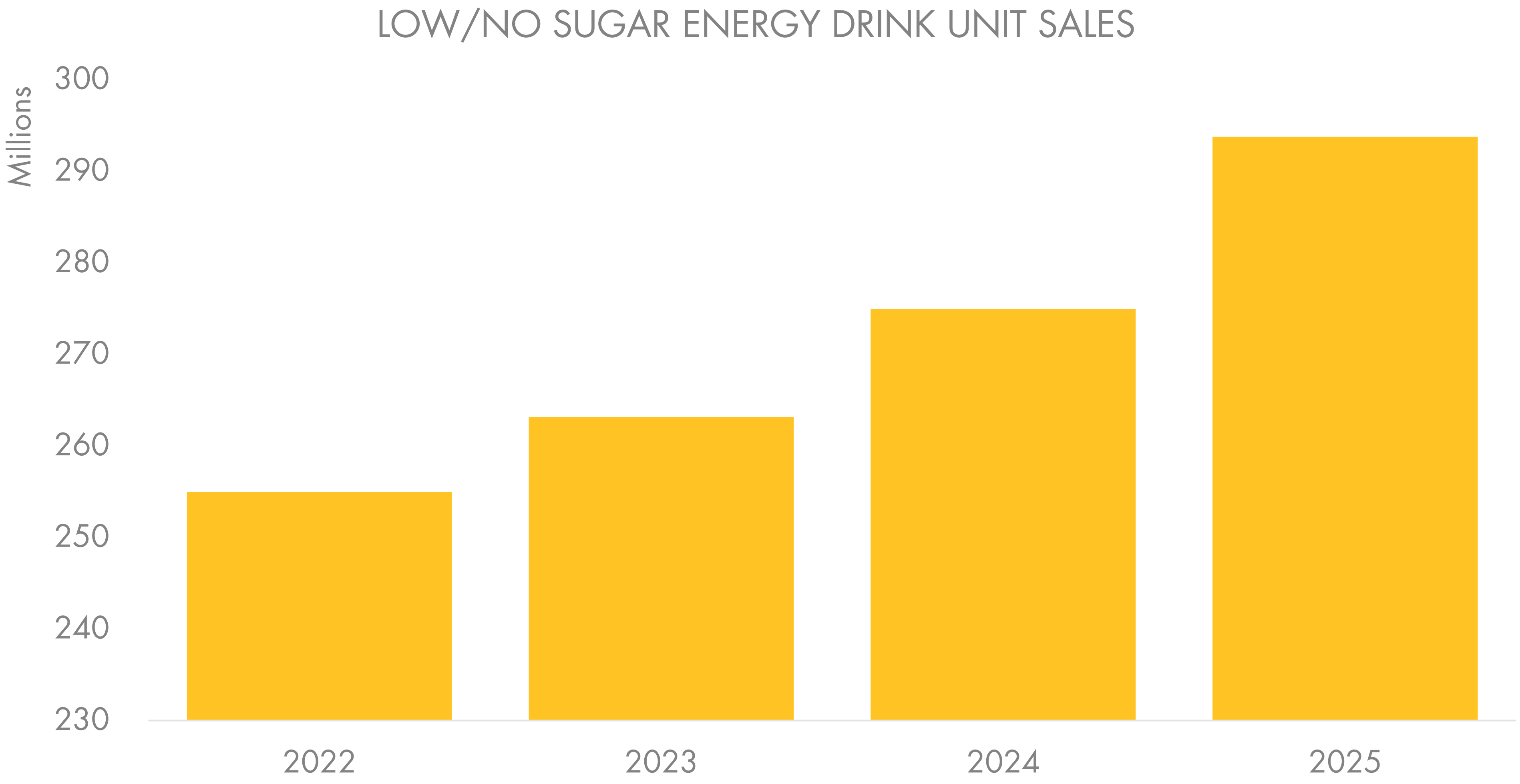
THINK
SHOPPER.
ACT
CATEGORY.

45%

UNIT GROWTH COMES FROM LOW/NO SUGAR IN THE LAST YEAR

Source: Nielsen Discover Sector (Total Independents & Symbols) – 52 W/E 24/1/26

WITH ANNUAL GROWTH ACCELERATING VERSUS PREVIOUS YEARS



SINGLES DELIVER THE MOST VALUE TO THE CATEGORY – WORTH 92% OF TOTAL VALUE

THINK SHOPPER. ACT CATEGORY.

£4.8bn

Total Spend

1.5bn

Trips

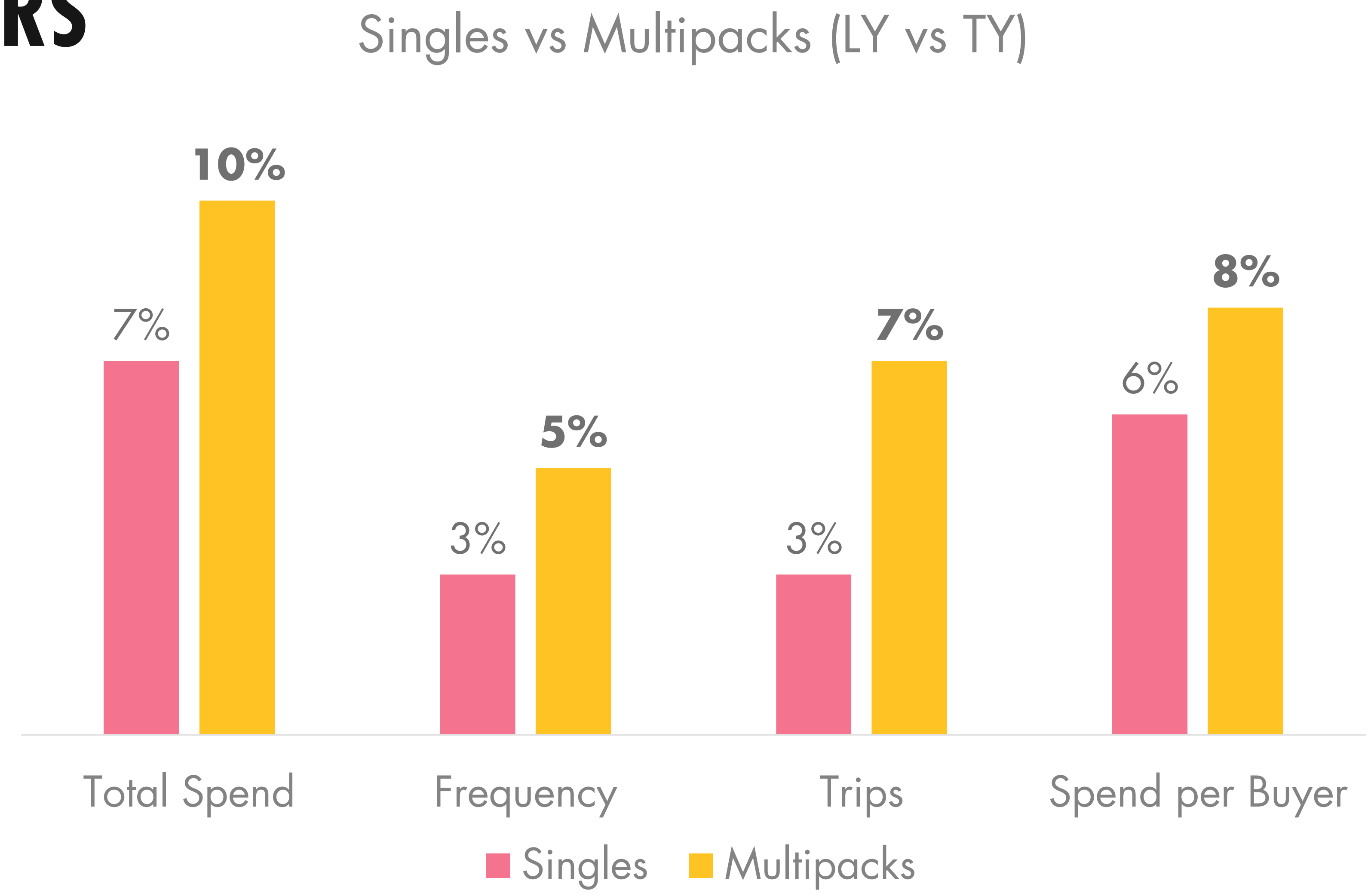
£3.21

Spend per Trip

Source:Source: Nielsen IQ | Sports & Energy Drinks | Value Sales YoY Abs & % Chg| 52wk to 31/1/26
, Kantar, Indies & Symbols, October 2025

BUT MULTIPACKS ARE ACCELERATING GROWTH, DRIVING BIGGER BASKETS AND RECRUITING MORE SHOPPERS

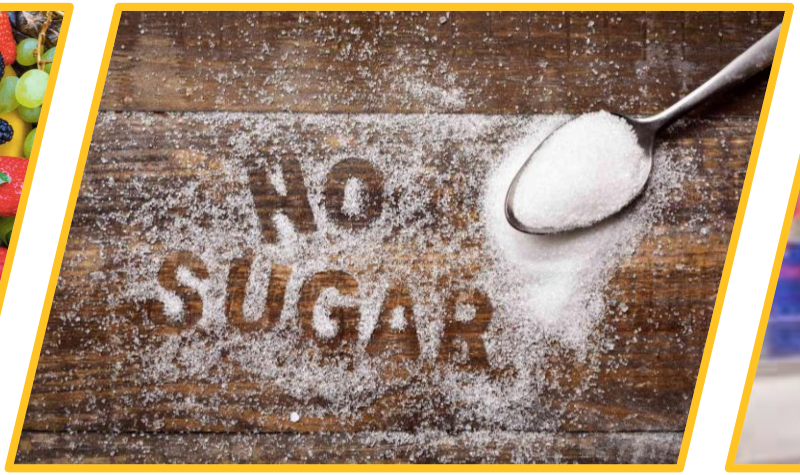
THINK SHOPPER. ACT CATEGORY.



Source: Kantar, Indies & Symbols, October 2025

HOW TO LEVERAGE CATEGORY TRENDS AND DRIVE FURTHER GROWTH

THINK SHOPPER. ACT CATEGORY.



FLAVOURS

Flavoured NPD brings new shoppers into the S&E category and drives growth. With new flavours often building hype on social media, ensure stocked with new and exciting flavours for shoppers to avoid shopper loss to competitors

LOW/NO SUGAR

As consumer health concerns and priorities shift with the wider macro trends seen, ensure you're offering both full and low/no sugar options of key brands and SKUs to minimise category penetration loss

MULTIPACKS

Encourage take home purchases and drive volume through multipacks in the chiller. As HFSS continues to change the wider shopper habits, multipacks may become habitual in place of multibuys


HOW TO HELP
SHOPPERS SHOP!

MERCHANDISING PRINCIPLES

4 KEY PRINCIPLES TO MAXIMISE SALES ON SHELF & HELP SHOPPER JOURNEYS

THINK SHOPPER. ACT CATEGORY.

SIGNPOST THE CATEGORY

CONSUMERS USE COLOUR AND SHAPE TO NAVIGATE IN-STORE

STOCK SKUs AT EYE LEVEL

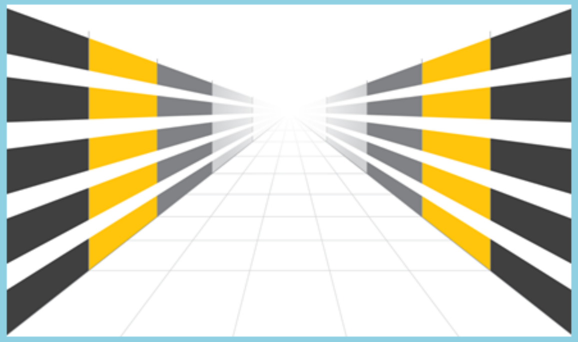
PLACE HIGHEST AWARENESS BRAND AT EYE LEVEL

BRAND BLOCKING

GROUPING PRODUCTS BY BRAND EASES THE FINDABILITY

VERTICAL MERCHANDISING

SHOPPERS CAN ONLY SEE PRODUCTS WITHIN A **1.3M** BREADTH



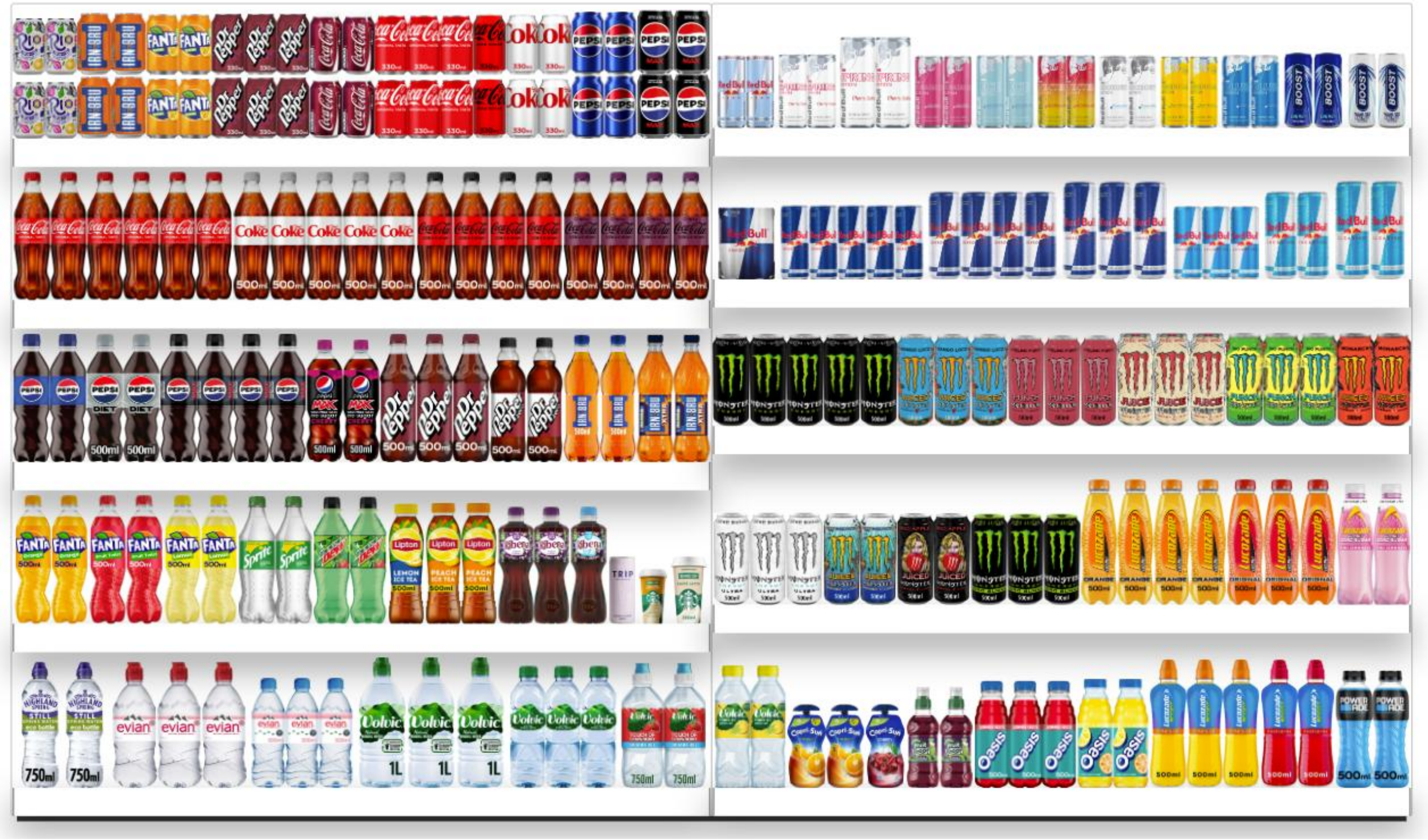
PLANOGRAMS

1.25M X 1 BAY

THINK SHOPPER. ACT CATEGORY.

1.25M X 2 BAY

THINK SHOPPER. ACT CATEGORY.



1.25 X 3 BAY

THINK SHOPPER. ACT CATEGORY.

ANY FURTHER QUESTIONS

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